



Business Consulting Services

# Completing the PMP

USAID Performance Management Workshop  
2004

Integrated Managing for Results (IMR) Project  
Contract AEP-C-00-99-00034-00

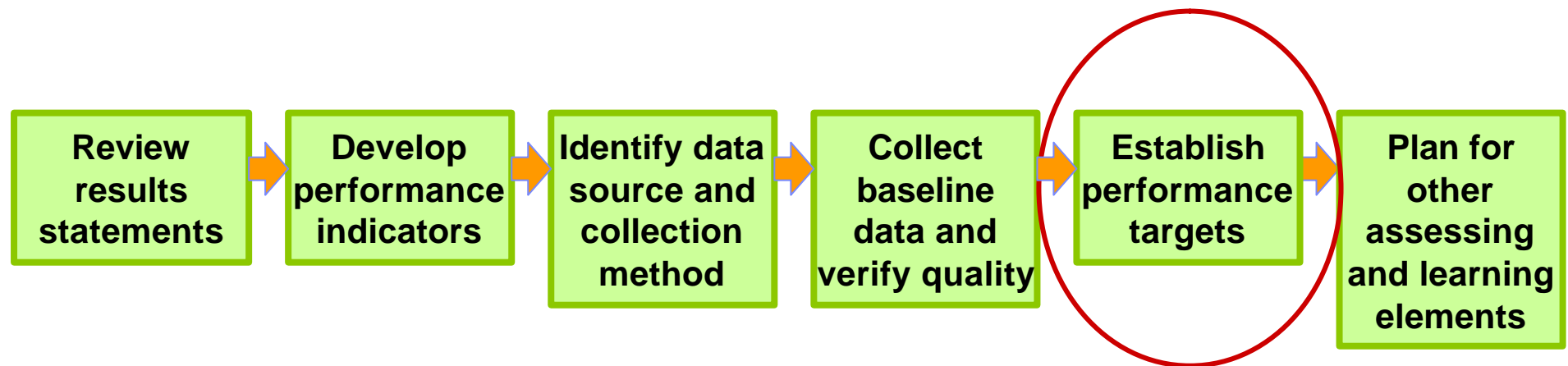
## Learning Objectives

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- **Best practices for setting targets**
- **Documenting baseline and targets in Performance Indicator Reference Sheet (PIRS)**
- **How to use the PMP to plan for all assessing and learning elements**
- **Be aware of the link between monitoring and evaluation**

## The PMP Development Process

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## Performance Target

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- **Specific, planned level of result to be achieved within an explicit timeframe**
- **Targets:**
  - Can be expressed in quantity, quality or efficiency
  - May be determined by setting final target first, then interim targets
  - May need to be set after activities or sites are selected
  - Can be adjusted over time
  - Should be ambitious but achievable!
  - Should be outside the margin of error of historical trend
- **If you don't know where you're going, you'll end up somewhere else - Yogi Berra**

## Target Setting - Best Practices

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- Look at historical trends
- Consider partner and customer expectations of performance
- Think about social norms and cultural factors
- Consult experts/research findings
- Benchmark accomplishments elsewhere
- Disaggregate where relevant and possible



## Resources on Setting Targets

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- **ADS 203**

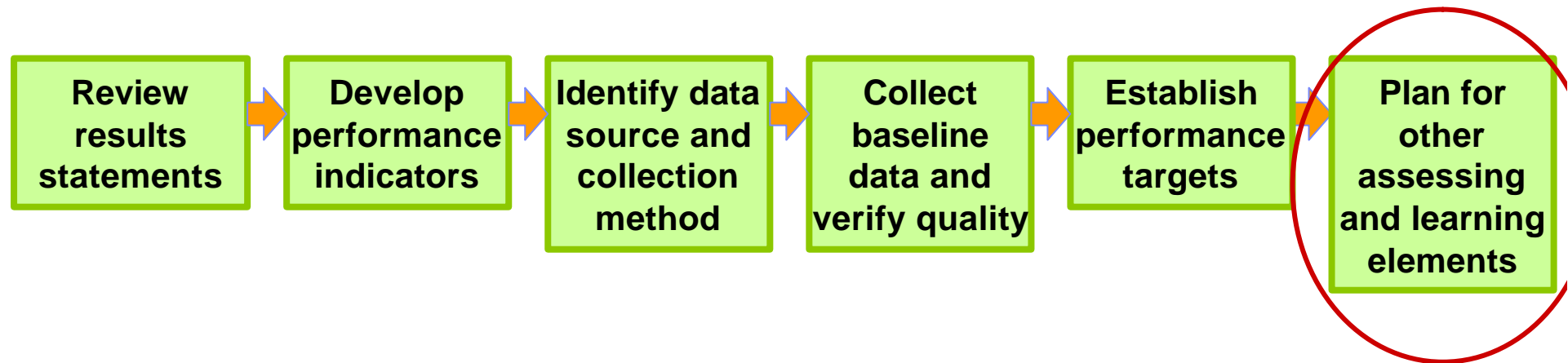
- <http://www.usaid.gov/pubs/ads/200/203.pdf>

- **CDIE TIPS**

- TIPS 8: Establishing Performance Targets
    - [http://www.dec.org/pdf\\_docs/PNABY226.pdf](http://www.dec.org/pdf_docs/PNABY226.pdf)

## The PMP Development Process

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## USAID will Maintain a Performance Management Task Schedule in Which Partners are Stakeholders

**Worksheet 9: Performance Management Task Schedule**

Use this worksheet to schedule all of the SO team's monitoring and reporting activities over the life of the SO. Modify the table to include additional indicators and years as needed. An excerpt from a completed schedule can be found in Part 2, Task 6.1 of the Toolkit.

PERFORMANCE MANAGEMENT TASKS	FY 2004				FY 2005				FY 2006				FY2007				Notes
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
COLLECT CONTEXT-LEVEL DATA																	
COLLECT SO-LEVEL PERFORMANCE DATA																	
COLLECT IR-LEVEL PERFORMANCE DATA																	
COLLECT ACTIVITY-LEVEL DATA																	
CONDUCT EVALUATIONS & SPECIAL STUDIES																	

- Who?
- When?
- Before what?
- Why?

- Technical Reviews, Solicitation Documents, Beginning of Contracts, Target Setting with Partners, Semi-Annual reviews, Portfolio Reviews, Preparing Annual Reports, Background for Co-Dels, Intensive Program Review, Closing Out SO . . .



## Performance monitoring and evaluation

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### Performance Monitoring

- Focuses on whether results are being achieved or not
- Ongoing, routine
- Often quantitative
- A process that involves
  - identifying indicators, baselines and targets
  - collecting actual results data
  - comparing performance against target
- Contributes to management decision making

### Evaluation

- Focuses on why/how results are achieved or not
- Occasional, selective
- Quantitative and qualitative
- A structured, analytical effort to answer managers' questions about
  - validity of hypothesis
  - unexpected progress
  - customer needs
  - sustainability
  - unintended impacts
  - lessons learned
- Makes management recommendations